Release Management Plan

Name of Application: CMS Net

Date Modified: 08/15/2011
Document Version: 4.2

Table of Contents

1 Document Control

This section lists the details of the reviews for this document

VERSION NO.	NAME OF REVIEWER	ROLE	DATE
1.0	Bob Morthole	Manager	10/16/2006

1.1 Change History

This section details the changes this document has undergone

VERSION NO.	DETAILS OF CHANGE	CHANGED SECTIONS	PREPARED BY	DATE
1.0	Initial Version	All	Siva Parameswaran	06/01/2006
2.0	Changes based on feedback from Bob	All	Siva Parameswaran	10/16/2006
3.0	All sections reviewed	All	Siva Parameswaran	
4.0	All sections reviewed	All	Siva Parameswaran	05/19/2011
4.1	Few sections modified	5.1;5.2;7	Siva Parameswaran	07/06/2011
4.2	Expedited release	6.1; 6.2	Siva Parameswaran	08/15/2011

2 Purpose

Software updates termed "Change Cycles" are performed with the CMS Net application. Currently the change cycles occur on designated Saturdays; however the date is determined by the Change Management Coordinator in consultation with the development team. This also includes any emergency fix releases that may be required and when the system is adversely affected by a recent change.

The purpose of the Release Management Plan is to provide details and clarity on the steps involved in the implementation and rollout of the CMS Net application packages. This also includes information to ensure that the implementation is conducted systematically in order to implement the enhancements and/or changes made to the application.

This plan identifies critical activities required to ensure that the source code that has been developed and tested is successfully migrated from the stabilized Acceptance Test (AT) Environment to the Production Environment.

3 Target Audience

The intended audience for the Release Management Plan is:
- Application Manager
- Project Manager
- Development Team
- Infrastructure Team

4 Prerequisites for Release

The prerequisites for the production release are as follows:
- Acceptance Testing is complete and is signed off by the Change Management Coordinator.
- The downstream/upstream systems are notified about the production release.
- The rollout package is verified and tested by the development team prior to the production rollout.
- There are no unresolved outstanding issues reported during the AT.
- There are no pending project issues pertaining to the release.

5 Build Process

5.1 Release Naming Convention

It has been standard convention to use release names using the following format:

zFvvnnn   (eg)   CFIS001

Where:

z Is C for CMS release
vv are the contractor's initials (ie: IS – Infinite Solutions)
nnn is a sequential release number

5.2 Cache Packaging and Release Procedure

1. Once verified all related code changes will be exported into an XML release file.

2. Upon verification for an IR/SMCR to continue on to acceptance test, package all associated elements (If all elements from the original package are fine, use the same release file). Continue this step until all elements for all IR/SMCR's in the release are packed. If the IR fails testing in this environment, determine the reason (it may be a setup, configuration or data issue and unrelated to your fix). If the reason for failure is with your fix, return for corrective action. If the problem is unrelated to your fix, correct the issue and retest.

3. Move and install the package into acceptance test when given the go ahead by CMS-CM. If the IR fails testing in this environment, determine the reason (it may be a setup, configuration or data issue and unrelated to your fix). If the reason for failure is due to the fix, return for corrective action. If the problem is unrelated to your fix, correct the issue and retest.

4. Install the package into production when approved by CMS-CM.

5. On need basis, the production environment will be made available to the testing team in test mode. This means that the data will still be current; however the ports that connect to the external production systems will be modified to test ports. Testers may test without any real-time updates to CATS, MEDS, fiscal intermediary and once the testing is signed off, the environment is restored back to production mode. A database backup is taken prior to the testing with the release changes and then restored after the testing is completed and signed off.

5.3 Web Release Procedure

1. Once the packages are built and signed off for production release, the static ZIP and dynamic WAR files are ftp'd to the following location:

   https://sftp.dts.ca.gov/

2. The CIO -Business personnel deploys the packages in the web sphere servers according to the release notes instructions and any configuration changes, if specified, would be carried out as well.
3. Once the package is deployed, the application is tested for its completeness.

6 Release Process Overview

The following is the overview of production release, dependencies, responsibilities, location and support activities.

Web

GROUP	LOCATION	OPERATION / RESPONSIBILITIES
Development Team	Sacramento	• Build packages (static and dynamic) • Verify packages • Prepare Release Notes, Deployment Checklist • Verify release
CIO E-Business	Sacramento	• Deploy the packages • Confirm deployment
CMS Systems Analysts	Sacramento	• Verify the application

Caché

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CMS Systems Analysts	Sacramento	• Verify the application

6.1 Emergency Release

Emergency releases may be required when there are necessary updates to correct errors that cause adverse affect on the CMS systems. The development team will perform the release upon approval from the Change Management Coordinator with an Emergency Release Report that includes, but not limited to, the following information:
- Summary of the change
- Analysis and Impact of the change
- Test Results
- Sources affected
- Release specifications

The report details might refer to the helpdesk database for most of the details where they are to be recorded against an IR or DR.

For emergency releases such as data repairs, the DR may be tested and signed off in one test environment before being deployed in production.

6.2 Expedited Release

Expedited releases may be required when there are requests that may contain defects or enhancements and does not require extensive testing or regression testing in order to be implemented.

The development team will coordinate with the Change Control Coordinator to determine the requests, the implementation schedule and deploy the fixes accordingly.

These types of releases may also depend on the availability of the Office of Technology resources for any web related releases. The frequency of such releases depends on the number of requests that are prioritized for the release.

6.3 Reconciliation

This section identifies the tasks required to ensure that the installation proceeds as scheduled, intended and planned.

TASK	DATE	RESPONSIBILITY	REMARKS
Inform CIO E-Business team about the release and location of the packages to be deployed	Two week s before the release	Technical Lead	Send email to E-Business_DG group
Prepare Release Notes	Before start of UAT	Lead Developers	Release Notes will contain specifics to the intended release.
Send Release Notes to the CIO E-Business team	One day before release	Technical Lead	Refer to the specific Release Notes for each release.
FTP web packages to the production server	One day before release	Web Lead Developer	https://sftp.dts.ca.gov/
Backup the databases	Day of	Cache Lead	For restore/rollback purposes

TASK	DATE	RESPONSIBILITY	REMARKS
	release	Developer	

6.4 Signoff

The Change Management Coordinator would send an email confirmation that the release addresses the signed off requirements and the implementation is successful.

7 Contingency Plan

The backup and restoration plan will be utilized in the event, the implementation causes adverse action to the CMS Production system that cannot be resolved in a timely manner.
All the datasets on the database server are backed up into a release specific folder before the commencement of the release. In case of rollback, these backup datasets are restored from the backup folder.

For the web package, the prior production package is installed on the previous environment and is also available on the application servers and on the shared folders for reinstall.

8 Personnel Requirements & Contact List

8.1 Resource List

The following list identifies those resources directly involved in the releases:

ROLE	NAME	PHONE	EMAIL
Technical Lead	Siva Parameswaran	916-327-3095	Siva.Parameswaran@dhcs.ca.gov
Cache Lead Developer	Denver Braughler	916-327-2691	Denver.Braughler@dhcs.ca.gov
E-Business Admin	E-Business_DG		E-Business_DG@STATE.ca.gov
Infrastructure Support	Seth Phomsopha	916-327-2338	Seth.Phomsopha@dhcs.ca.gov

8.2 Escalation List

The following list identifies additional resources and escalation.

ROLE	NAME	PHONE	EMAIL
Technical Lead	Siva Parameswaran	916-327-3095	Siva.Parameswaran@dhcs.ca.gov
CMS Change Management Coordinator	Julie Rundall	916-327-2295	Julie.Rundall@dhcs.ca.gov
CMS ISU Chief	Traci McCarley	916-327-3075	Traci.McCarley@dhcs.ca.gov

9 Acronyms

CMS	Children's Medical Services
CIO E-Business	Office of CIO (E Commerce Technology Division)
FTP	File Transfer Protocol

AT	Acceptance Test